Appendix 1: Equipment Donation Request Form
Source: TecsChange
Available from www.techschage.org

TecsChange Local Action Committee
Equipment Donation Request Form

This form is to be used by Boston area nonprofit organizations that want to request computer donations from TecsChange. Please fill in this information for the organization that will be the official recipient of the donated computer equipment. Please answer all questions that apply. This will help us determine if your organization can qualify for donations of equipment.

Contact Information

Contact Name: _____
Organization Name: _____
Telephone Number: _____
FAX Number: _____
Mailing Address: _____
_____
E-mail address: _____
Web Address: _____

Organizational Questions

Please describe the mission of your organization.

_____

Are you recognized as a non-profit or charitable organization?

_____

Does your organization provide services (health, education, etc.)? If so, please describe.

_____

Does your organization do organizing work (labor, youth, etc.)? If so, please describe.

_____

Does your organization do advocacy work (environment, human rights, etc.)? If so, please describe.

What other programs and projects does your organization implement?

_____

From what sources does your organization obtain funding?

_____

Has your organization ever been turned down for funding because of your mission statement?

_____

Specific questions about the donation

From what other organizations have you requested donations?

_____

What tasks do you wish to perform with the computer?

_____

Do you have a budget for this project?

_____

How do you anticipate this technology will further the work of your organization?

_____

Transportation & logistics

Because TecsChange is a volunteer-run organization, we may not have the ability to transport the equipment to your location. Have you established a means of transporting the equipment?

_____

Do you, or anyone you know, have the ability to set up the computer upon arrival?

How did you hear about TecsChange?

Appendix 2: Scope of Work Agreement
Created By Forrest Sutton and The Local Action Committee

Appendix 3:Technology Plan Template
Source: Techsoup.org, Modified by the LAC
Original available www.techsoup.org

Technology Plan : (see document #1)
Objectives:
1. To understand *your organizations* current technology status, including organization, hardware and systems software, applications software, and level of automation of the business
2. To identify any issues related to *your organizations* ability to maintain its current technology and to meet its strategic plan
3. To assess financial implications of *your organizations* technology plans

B. Current IT Environment

B-1. Infrastructure

Hardware

	Server	Location	O/S	IP address
1		Admin office	N/a	
2	Printer			
3	DSL router			
4	Computer		Win98	
5	Computer		Win98	
6	Computer		Win98	
7	Computer		Win98	
8	Computer		Win98	
9	Computer		Win XP	

1. The Current Numbers of Computers meet our Needs? Yes or no

2. When we add staff we will acquire more computers by? Donations / Purchase?

3. When will we be adding new staff? Do we have money in the budget for Hardware software?

4. Software Licensing (Please see Document # 2 "Understanding Licensing")

	Application		Vendor	# PC installed on
1	Office 2000		Microsoft	7
2	Virus scan		Norton	7
3	Filmmaker pro 6		File Maker	1
4				
5				

5. Maintained (please see Document #3 Back up #4 virus)
a.) Is there a backup scheme? Are there plans to implement a back up scheme?

b.) Virus scans. All computers have Norton anti-virus installed on them; any new computers will also have a virus scan software installed on them.

6. Personnel
Who is responsible for Network and other technology needs?

Who will be contacted in their absences?

Consultance: (please include all)
Name:
Organization:
Contact phone:
Contact e-mail:
Rate per hour:

Appendix 4: Understanding Technology Planning
Source: Techsoup.org, Modified by the LAC
Original available www.techsoup.org
Understanding Technology Planning Document# 1

Technology planning is the process of determining how your organization can best use technology to further your mission. The process of technology planning involves assessing your existing resources, defining your needs, and exploring solutions. A successful planning process will draw on management support and the leadership of a technology team made up of a range of staff members to provide input. It will help you budget for technology and make cost-effective purchases. The first outcome of the planning process is a written technology plan, which outlines the phases of technology development, and can also be used as a key tool to advocate for technology funding.

1. What do you see as the most pressing needs for your organization, that technology might address?

2. Why/how do you think computers can help?

3. If all computer systems were magically working and adequate tomorrow, what would change in the organization?

4. Who at the agency has been involved in planning for technology staffing, training and purchases?

5. Who at the agency has been involved in day-to-day computer troubleshooting and maintenance tasks?

6. Who will be involved in the implementation of new technology efforts?

7. Are staff members able to use the technology that is crucial to their efficiency and to the tasks they need to accomplish?

8. What type of training have staff members completed in the past? How useful was it?

9. What type of financial resources does your organization have available for technology? Are you prepared to seek additional funding from other sources?

10. What are the obstacles to your organization's effective use of technology?

11. What is management's attitude and role in the organization with regards to technology?

12. How would you assess your use of technology compared to other agencies with similar

missions?

13. Do you need better systems to streamline your operations, increase communication among staff, reach out to clients, cultivate your board, or communicate with your members?

14. What role does the implementation of new technologies play in your strategy for the next five years? Do you need new technology in order to grow? Would new technology allow you to respond to new opportunities?

Strategic Technology Planning
What is it?
Strategic technology planning is a dynamic and reflective process that organizations engage in to seize the potential of advanced technologies. Strategic technology plans are grounded in your mission and fully integrated into your overall strategic plan. The strategic technology planning process ensures that you will clarify technology goals and establish priorities, organize relevant stakeholders and create evaluation systems - all before making hardware, software or Internet presence decisions.

Principles
A set of core principles helps to ground the plan in organizational mission and positions your organization to take full advantage of technology. The emphasis is on the importance of getting your board and other constituencies involved in the planning. Using the 70-20-10 rules as a guide helps you keep 70% of the discussion, implementation and funding focused on the people while 30% is focused on the hardware and software. The plan is integrated between departments, developed with your strengths and weaknesses in mind and laid out in phases to ensure effective implementation. Program outcomes are central to all the decisions made and financial and other sustainability issues such as staffing and technology policies and procedures are addressed assertively. Most importantly, the process is set up to make it possible for you to continually evaluate and shift the plan over time.

Planning Principles
Steps in the Process

These are some basic tasks/steps that are part of the process.

* Form a technology team that brings together technology and non-technology experts from the many different parts of your organization.

* Bring together staff, leadership and other stakeholders to explore the potential of technology and its impact on your organization.

* Analyze your organizational history, strategic plans, constituencies, environmental climate,

staffing, funding and other issues.

* Assess your current technology status.

* Clarify specific technology goals and strategies for programs and internal operations.

* Develop establish technology priorities that are reflective of your programs, financial status, culture and infrastructure.

* Specify the 'sustainability' aspects of your plan: evaluation methods, training, technical support, policies and procedures.

* Prepare budgets, funding plans and grant proposals

Appendix 5: Understanding Licensing
Source: Techsoup.org, Modified by the LAC
Original available www.techsoup.org
Document #2 Technology plan: Licensing

Making Sense of Software Licensing

If you are in charge of keeping track of your organization's technology, you know that software presents you with a unique set of problems. Unlike hardware, software is hard to pin down. Software licenses tend to be written for a legal audience, and even to lawyers, they may not be particularly clear. However, understanding software licensing is crucial to managing technology within your organization.

The Law's Involved: Copyrighted Software

Software isn't traditional property, but most software manufacturers consider their products intellectual property, just like books, movies, and music recordings - and most international law and U.S. copyright law agree. For intellectual property, some uses are included in the purchase price; for other uses, you must obtain permission. As an example, purchasing a book gives you the right to use, sell, or give away the book. But if you want to reprint or copy a large part of the book, or incorporate it into a work of your own, you have to ask permission. This legal framework evolved over centuries, and includes court cases as well as legislation.

License? But I didn't sign anything

Intellectual property owners can give others permission to use their property by licensing it to the users (usually in exchange for money). In the book example in the last paragraph, many of the uses are included in an implicit license granted to you when you purchased the book. For software, the license is both printed on the box and considered to be in effect as soon as you open the box (the so-called "shrink-wrap" license) and/or shows up on one of the early screens when you install the program. In either case, the license provides restrictions on appropriate use of the software. Generally restrictions are placed on how the software can be copied, modified, and distributed. As a result, there are an infinite number of different ways that software can be licensed, but there are some generally accepted classifications of copyrighted software.

Proprietary Software

Example: Microsoft Office 2000
Most commercial software today is proprietary. Proprietary software generally costs money, and its distribution and modification are prohibited. There are two common types of licenses for proprietary software:

> ### End User License Agreement (EULA)
> The most common type of license, a EULA provides stipulations as to how a piece of software may be used within an organization. Some software may be installed on multiple machines so long as only one is running at a time, while other software may only be loaded on one
>
> machine ever. In general you cannot have multiple copies of the software running at the same time under a EULA license. Most shrink-wrapped licenses are of this

type.

Site License Agreement
Generally, site license agreements grant schools, universities, and large organizations permission to copy and distribute a piece of software to members within the institutional community for a negotiated price. Each site license agreement has its own requirements for eligibility (affiliation, installation, and usage restrictions) and its own obligations imposed on the organization for enforcement of the rules.

Freeware
Example: Netscape Navigator
Freeware, as the name suggests, does not cost any money. However, it is still copyrighted, and its modification and usage are limited. Because most freeware authors hope for as large an audience as possible for their software, distribution rules tend to be more relaxed than proprietary, but the authors still don't want you to modify their software.

No Money Down: Shareware
Example: McAfee VirusScan
Many people confuse shareware with freeware. While shareware and freeware authors both allow and encourage distribution, the similarities end there. Shareware can basically be considered trial or demo software. You are allowed to use it for a time, but if you want to keep it, you are required to register and usually pay a licensing fee.

Relax - It's Free Software
When computing technology was in its infancy, the software audience was sufficiently small for most software to be distributed freely between colleagues and students. Software was distributed with its source code (the programming behind the application), and modifications were not only allowed, they were encouraged. Of course, as we all know, things didn't stay free. People eventually realized they could make some money on software, and we were left with the market we have today. However, free software (not to be confused with freeware is making a substantial comeback. Projects like Linux and GNU have been extremely successful and are gaining popularity and support. There is some terminology that is useful for understanding free software.

Copylefted Software
Example: Meadowbase
From the Free Software Foundation: "Copylefted software is free software whose distribution terms do not let redistributors add any additional restrictions when they redistribute or modify the software. This means that every copy of the software, even if it has been modified, must be free software. Copyleft is a general concept; to actually copyleft a program, you need to use a specific set of distribution terms. There are many possible ways to write copyleft distribution terms." The GNU General Public License (GPL) is the classic example of copyleft licensing.

Open Source Software
Example: Linux
Open Source software is usually copylefted. It is always distributed with the

source code for modification, and generally there are very few restrictions on usage and distribution.

Public Domain Software
Some software is considered in the public domain-it isn't copyrighted and the authors/distributors have not provided copyleft terms. So, public domain software can be redistributed by anyone as proprietary software - for a profit.

Appendix 6: Back Up

Source: Techsoup.org, Modified by the LAC

Original available www.techsoup.org

Document #3 Technology Plan: Back ups

Backing up your data

As the conservation movement's use of computers increases, so does the importance of making regular backups of your key data. How effective would you be if your email, word processing documents and contact database were wiped out? How many hours would it take to rebuild that information from scratch?

Backing up your data regularly is vital insurance against a "data catastrophe." Unfortunately, this is a lesson that most people learn only from bitter experience. Developing a solid backup plan requires some investment of time and money, but the cost is far less than the often-impossible task of recreating data for which no backup exists!

Backup best practices

All backup routines must balance expense and effort against risk. Few backup routines 100% airtight -- and those that are may be more trouble to implement than they're worth. That said, here are a couple of rules of thumb that should guide you in developing a backup strategy:

1) Develop a written backup plan that tells you:

- What's being backed up

- Where it's being backed up to

- How often backups are occurring

- Who's in charge of performing backups

- Who's in charge of monitoring whether backups are being performed successfully

2) Your database and accounting files are your most critical data assets. They should be backed up before and after any significant amount of data entry and/or use. For most groups, this means backing these files up every day. Groups that do a lot of data entry should consider backing up their database after each major data entry session.

3) You should back up your other documents (e.g. "My Documents" folders) and email files at least once a week, and probably once per day. Each organization needs to decide how much work they're willing to risk losing, and set a frequency of backups accordingly.

4) You should store a copy of your backups off-site to insure against a site-specific disaster such as a fire, break-in or flood. Ideally, you should store your backups in a safety deposit box. Generally, we recommend rotating a set of backups off-site once per week.

5) It is not usually necessary to back up the complete contents of each hard drive -- most of that space is taken up the operating system and program files, which can be easily reloaded from CD if necessary. The only exception is if your organization has a dedicated file server; it's a good practice to do a full backup of your server so that have a way to restore your server's entire hard drive.

6) Don't forget to back up your laptops! Laptops can be hard to back up, but are just as important as your desktop workstations.

7) Test your backups BEFORE you need them. You need confidence in your backups. Make sure your backup software has full read-back verification. Try restoring a few files.

Choosing backup hardware

Choosing appropriate backup hardware is the first key to implementing an effective backup strategy. In any situation, there are probably several "right" answers. Here are some guidelines for choosing backup hardware that will work for you:

1) Determine how much data you need to back up. Take a look at each machine on your network -- or at least a representative sample. How big is the each user's documents folder? How big is the email file? How much data do you in your organization's primary shared folder? Add up the totals for all your machines, or multiply the average by the number of machines in your organization. Be sure to leave room to add a few new staffers, and to plan for growth -- it's not impossible to add 100 MB of email per person per year.

2) Choose a backup device that uses tapes or cartridges with a capacity that's at least twice the total amount of data you need to back up. This will give you room for growth, and will also allow you to perform "incremental" backups on the same tape with a "full" backup. (More on this in a bit.)

For many organizations, DAT DDS-4 tape drives are a great choice, as these drives combine excellent reliability and reasonably fast speeds with large storage capacities (20-40 GB per tape) and reasonable media costs (~$25 per tape). DAT DDS-4 drives cost around $800.

Travan TR-5 drives are a bit less expensive (around $300). Their tapes hold 10-20 GB of data, and cost around $40 each. Travan drives are slower than DAT drives, and considered to be slightly less reliable. However, their low cost and solid performance make them a good choice for many environmental organizations.

Both DAT and Travan drives are widely-used standards and hardware is made by a variety of companies.

The third reasonable choice for mid-size networks is the Onstream Echo 30GB ADR drive. This drive costs about $250 and uses 30 GB cartridges that cost around $50 each. It's a proprietary format from a relatively new company. In today's world of fast-disappearing technology companies, there is some risk that the Echo format could be "orphaned" with little notice, but the Echo's large capacity and low price are compelling to small organizations with big data storage needs.

3) Another consideration is the speed of the drive and its interface to your computer. If you have a large amount of data to back up, having a big storage device isn't much good if you can't write data to it quickly. There are three common ways to connect a backup drive to your machine: SCSI, IDE and FireWire SCSI drives, which can be internal or external, are the fastest -- and most expensive. Most PC's don't have built-in SCSI adapters, so you may need to add a SCSI card ($50-$150). (Some servers have built-in SCSI, though.) IDE is used for internal drives only, and is inexpensive, with middling performance. All PCs have built-in IDE connections. Firewire is a new format for connecting external drives. Firewire devices are mid-priced, and offer mid-range speed. New Macs have built-in Firewire ports; PCs need to have Firewire cards added (~$100).

What about CD-RW and Zip drives?

CD-RW and Zip drives are inexpensive and lots of folks now have them. Why not use them as your primary backup device? Here are a few considerations:

☐ Limited capacity. CD-RW discs only hold about 650 MB of data per disc; that's plenty to back up your database, or a single person's documents and email, but it's not enough space to hold the files of everyone in a 5-20 person organization. Zip disks are even smaller, at 100-250 MB per disk.

☐ *Finicky hardware*. CD-RW drives can be finicky, and sometimes produce "coasters" -- failed recordings. Not something you want to base a backup strategy on. Zip disks are relatively fragile. And external Zip drives (especially older parallel port Zip drives) can be VERY slow.

Does that mean that CD-RW and Zip drives are useless? Definitely not! Here's how we think you should use CD-RW and Zip drives:

☐ *Use CDs for archiving old data.* CD-R disks are very cheap -- about $1 for each 650 MB disk. They're durable. And they can be read in any machine with a CD-ROM drive. These qualities make them uniquely well suited for archiving data that you don't need to change after it's been created. Photos and finished print publications are two great examples. Both generally involve large files that you need to keep around, but you're not likely to go back and change. Archiving old data files to CD-R is a great supplement to a tape-based backup strategy, because it lets you avoid wasting resources backing up big chunks of files that won't change. Plus, it makes your archives portable -- and easy to store a copy off-site.

☐ *Use Zip disks for transferring files, or as a secondary backup.* Zip disks are great for making quick, easy redundant backups of super-critical files such as databases and accounting files. We think it's a great idea to use a Zip drive on your accounting and/or database machines to make an extra backup of your most critical files.

Backup hardware compared

Standalone user(s)

Who: A single user, or several people who are in the same office, but do not have a local area network (LAN) connecting their machines.

Hardware:

The Iomega Zip drive is an inexpensive (<$200), easy to use drive that uses 100-250 MB disks that resemble floppies. These cartridges are fairly inexpensive and versatile. The Zip has many versions designed to attach to a PC or Mac any number of ways. The advantages of the Zip drive are that it is easy to attach to several different computers (especially the USB version), uses relatively inexpensive media, and holds enough data to easily back up most people's personal files. The SCSI, USB and internal IDE models are fairly quick, the external parallel port models quite a bit slower.

Something else to consider is the fact that the Zip has been around for a while and has become something of standard in the low-end removable-media market. Many print service bureaus use Zip media to transfer/receive large desktop publishing files. If you need to exchange files with other people this way, the Zip might be a good choice. On the other hand, Iomega has garnered a reputation for low-quality customer support, and some people have experienced quality problems with Zip drives resulting in damaged disks and lost data.

A single user with a large amount of critical data to back up (such as someone doing intensive database or GIS work) might consider a OnStream Echo or Travan TR-5 drive, which have a multi-gigabyte storage capacity.

Software:

Macintosh: We recommend that you store all of your personal files in a single master folder and back that entire folder up each week by simply copying the file to your Zip drive. If you'd prefer to automate the process, or want the added security of backing up your entire hard disk, we recommend Retrospect Express ($50), from Dantz. Retrospect Express is a simple, inexpensive and powerful backup program that should meet all the needs of a single user or small office network. Synk X is an easy-to-use shareware product that can back up to most mountable drives.

PC: We recommend using Retrospect Express ($60). Retrospect Express is a powerful and easy to use backup program that will help you manage your backups quite effectively. Some backup drives also ship with adequate backup software. For example, Iomega Backup, which ships with all Zip and Jaz drives, is much improved of late, and is freely downloadable from the Iomega Web site. The OnStream Echo drive also ships with serviceable software for a standalone user.

Small office

Who: A 3-7 person office with computers that are connected by an Ethernet LAN.

Hardware:

A Travan TR-5 format tape drive such as the Seagate TapeStor series of drives. These tape drives are relatively inexpensive and offer large storage capacities (up to 20GB on a single TR-5 tape). The OnStream ECHO drives are also a reasonable choice, with a 30GB per tape capacity.

Networks that need to store many sets of backup data might choose to use DAT DDS-3 or DDS-4 drive. The hardware cost is a bit higher than for Travan drives, but the media is less expensive, longer lasting and faster.

A high-capacity removable cartridge drive such as the Castlewood Orb would also be a reasonable choice for organizations that frequently need immediate access to their data archives. Orb drives use 2.2 GB removable cartridges with capacities Cartridges cost about $40 each--rather expensive compared to the much larger $20-30 Travan or DAT tapes. Orb drives (particularly the SCSI and internal IDE models) are very fast, and thus more convenient than tape to access frequently, and can store much more information per cartridge than the Zip drive. However, they cannot compete with the high storage capacity or low media cost of tape backups.

In addition, small offices may also consider purchasing a CD-RW drive. It can supplement your primary backup system by providing a means to inexpensively archive old data. CDs are particularly well-suited for archiving data that doesn't change after it's created, such as newsletters and photos. CDs offer very low cost-per-megabyte archival storage, and CDs are both durable and easy to use..

Software:

Macintosh: Retrospect Workgroup Backup ($300) is an appropriate choice for backing up a network of machines.

PC: Retrospect Workgroup Backup ($300) or Veritas Backup Exec Desktop Pro ($130) are reasonable choices. Retrospect offers more advanced functionality, but Veritas Backup Exec Desktop Pro works almost as well in a peer-to-peer environment, but doesn't support NT

Appendix 7:Virus prevention

Virus prevention checklist
Tayna Buba (2002), techrepublic.com
Modified by LAC

Recovering from a virus can be time-consuming and costly. To help you avoid such problems in the first place, we've assembled a checklist that includes options to consider when developing your virus prevention policies and plans. Of course, working environments differ, and it can be tricky to strike a balance between preventing viruses and hampering employee productivity. While a particular method may seem prudent to some IT managers, it may be viewed as too cumbersome and restrictive by others. But the possibilities on this list should help you determine which strategies will be the most effective for you and your end users.

Security settings

☐ Schedule regular backups of your data files.

☐ Protect all of your servers (including e-mail and firewall servers) with antivirus software.

☐ Install antivirus software on all workstations.

☐ Enable the virus-detection option in CMOS.

☐ If you have a firewall, make sure only necessary ports are open.

☐ Windows NT administrators, set permissions to the registry and other system files to prevent unauthorized changes.

☐ Enable the virus expiration warnings to alert you when signatures are outdated.

☐ Set the server to scan both incoming and outgoing files.

☐ Include all file types when scanning, such as exe, dll, and zip files.

☐ Consider using a software package that allows files to be quarantined. This will prevent users from gaining access to the infected files and perpetuating the virus.

☐ If productivity will not be compromised, consider disabling the A drive of high-risk workstations from within a password-protected CMOS. If this is not feasible, disable the option of booting from the A drive.

☐ Set an audible alert when viruses are detected.

☐ Set user response options to the minimal acceptable level, such as "Cure" or "Quarantine." Do not give the user the option to "Cancel" the repair.

☐ Enable all macro virus protection within software packages, such as Word and Excel.

☐ Edit the file-exclusion list so all exe and dll files are included during scanning. Some viruses target these files specifically.

☐ Create and maintain a write-protected emergency boot disk and know how to use it.

Signature updates

☐ Schedule regular updates of virus signature files. Most manufacturers offer updates on a regular basis—daily, weekly, biweekly, or monthly.

☐ Distribute the update to the workstations. If your NOS doesn't allow you to "push" updates to your users, consider sending it as an e-mail attachment.

☐ Make sure you update your write-protected emergency boot disk whenever new signature files are received.

Diskette management

☐ Avoid using data and program disks received from unknown sources.

☐ Enact a policy that enforces the scanning of all diskettes before they are used in a workstation. You might want to set up a remote PC, perhaps an old 486, for this purpose.

☐ Consider providing a stockpile of virus-free diskettes for users to take home. Scan the disk upon re-entry to the workplace to ensure that the user's home PC is not infected.

☐ Write-protect all data and program diskettes.

Scanning

☐ Consider using a dedicated workstation that continually scans data directories on the network.

☐ Schedule full workstation scans on a regular basis with minimal intrusion to the user, such as during lunch or after hours.

☐ Perform scanning in "stealth mode" to achieve minimal intrusion to the user.

☐ Disable user intervention of scans.

☐ Enable background monitoring on the workstations.

☐ Determine if your browser offers a plug-in to scan files prior to downloading and use it if available. Netscape Navigator offers this in conjunction with Norton AntiVirus software.

☐ If a plug-in is not an option, make sure all downloaded files are scanned prior to installation.

☐ Smaller companies may want to document the date of the last "clean" scan of each workstation to alert the IT department at a glance.

☐ Scan new PCs received from vendors, as they have been known to contain viruses out of the box.

E-mail policies

☐ Set e-mail server filters to eliminate spam and unsolicited junk e-mail that could contain a virus as well as malicious code.

☐ Set the server to immediately send a notification to the network administrator as well as the user. This will alert the user of the infected message before it is opened.

☐ Scan all incoming and outgoing e-mail and attachments.

☐ Discourage non-work-related downloading of attachments.

- [ ] Do not allow users to forward jokes or chain letter e-mail.

- [ ] Consider subscribing to a third party e-mail scanning service. Infected e-mail and attachments never enter your network.

- [ ] Call or e-mail the individual who sent the infected e-mail or document. They may not know they have a virus.

User policies

- [ ] Develop a system to educate all users about polices such as the "no download rule."

- [ ] Require that all software installations be performed only by the IT department.

- [ ] Do not allow your users to download or install shareware, such as games and screensavers.

- [ ] Create a rule that users should not bring diskettes from home, unless they are willing to allow the diskettes to be scanned by the IT department prior to being used.

- [ ] Consider limiting Internet access to approved sites. IE 5.0 allows an administrator to create a password-protected list of approved sites.

- [ ] Institute a set of applications that users have available to do their job. Do not allow any software to be installed beyond those provided with their system.

- [ ] Do not allow remote-access users to upload files to the network unless the IT department can verify the integrity of the PC being used for remote access.

Virus detection utilities

- [ ] McAfee—http://www.mcafee.com

Highlights:

- Monthly antivirus signature updates
- Hands-free downloads
- Automatic updates and upgrades via subscription
- Free virus newsletter
- Virus encyclopedia—http://www.mcafee.com/viruses/virus_glossary.asp
- Virus hoaxes info—http://vil.mcafee.com/hoax.asp

- [ ] Symantec—http://www.symantec.com

Highlights:

- Weekly antivirus signature updates
- One year of free updates; $3.95/year thereafter
- Free product updates
- Virus encyclopedia and hoax info—http://www.symantec.com/avcenter/

Appendix 8:Interview tool

Created By Forrest Sutton and the LAC

An interview tool for evaluating the effectiveness of the TecsChange Local Action Committee

Section 1: Process and Equipment

1. Have the computers and network met your needs? Please explain

2. How did you find the LAC process of meetings, setup and installation? Are there ways that we could have improved it?

3. Did we set and meet your expectations?

4. The instructions that you received when the network was setup on trouble shooting network outages and setting up e-mails. Has this been useful?

Skill	use	frequency	Problems encountered
Tech plan			
e-mail			
Virus scan			

Section 2: tech plans

5. Do you know what a technology plan is and do you have one?

6. Do you have a plan of how and when you will replace/upgrade computers?

7. Do you have a virus scan?
   Do you have a backup strategy?
   How effective have these been for you?

8. How comfortable are you in finding solutions to your technological issues?

9. Where might you look to find answers on your own?

Source	use	frequency	Problems encountered
On line			
Cd rom			
Books			
Other materials			

Section 3: future needs

10. What additional information would have been helpful when we installed the network and equipment? How else could we have improved the process?

10. What addition areas would you like to see materials on now (printed materials, cd-rom or addition web references) on ?

11. If TecsChange offered inexpensive seminars ($35), what subjects would you interested in learning more about?
Trouble shooting errors?
How to maintain a PC?
Viruses
Networking
Database, basic or specific training?
Others?

Appendix 9 (interviews)

AIM interview
Interview with: Carol Ogen

02/05/03

An interview tool for evaluating the effectiveness of the TecsChange Local Action Committee

Section 1: Process and Equipment

1.Have the computers and network met your needs? Please explain
Yes, they are using them process more forms, they deal a lot with the city and government, they can now access more information as well as communicate with their constituents. More and more forms are now available on line. Their clients are using computers and internet to do research and find out more information.

2.How did you find the LAC process of meetings, setup and installation? Are there ways that we could have improved it?
Yes

3. Did we set and meet your expectations?
Yes, the time line was clear, there was a mix up

4. The instructions that you received when the network was setup on trouble shooting network outages and setting up e-mails. Has this been useful?

Skill	use	frequency	Problems encountered
Tech plan			
e-mail	yes	Set up servral	
Virus scan	yes	Installed on machines	

Section 2: tech plans

5. Do you know what a technology plan is and do you have one?
Yes, they have the outline

6. Do you have a plan of how and when you will replace/upgrade computers?
yes

1.Do you have a virus scan?
    Yes, all machines in the organization
        Do you have a backup strategy?
        no

How effective have these been for you?
Have not had to use the system

1.How comfortable are you in finding solutions to your technological issues?
    Yes, very comfortable

9. Where might you look to find answers on your own?

Source	use	frequency	Problems encountered
On line	Yes		Connecting to the internet
Cd rom	No		
Books	no		
Other materials	volunteers		Called and asked for help

Section 3: future needs

10. What additional information would have been helpful when we installed the network and equipment? How else could we have improved the process?
The tech plan up front
It was a long process from beging to end

10. What addition areas would you like to see materials on now (printed materials, cd-rom or addition web references) on ?

11. If TecsChange offered inexpensive seminars ($35), what subjects would you interested in learning more about?
Trouble shooting errors?
How to maintain a PC?
Viruses
Networking
Database, basic or specific training?
Others?

Interested in basic use of Windows as well as productivity tools, for the whole staff, some interest in databases (file maker pro)**Red Tomato Interview**
Marla Rhodes interviewed 2/27/03

Section 1: Process and Equipment

2.Have the computers and network met your needs? Please explain.

YES, we are now able to connect to Dproduce(a produce delievery database)
They use their network to share documents, printers and e-mail.

3.How did you find the LAC process of meetings, setup and installation? Are there ways that we could have improved it?
It was useful and the time was productive

3. Did we set and meet your expectations?
The timeline was realistic, and everything worked as promised

4. The instructions that you received when the network was setup on trouble shooting network outages and setting up e-mails. Has this been useful?

Skill	use	frequency	Problems encountered
Tech plan	Yes	A little	
e-mail	Yes	Occasionally	The ISP server was down
Virus scan	Yes	Every week	No problem, scan incoming e-mail

Section 2: tech plans

5. Do you know what a technology plan is and do you have one?
Yes, they are working on putting all the informations for a Technology plan.
The person interviewed does not do this as her primary job

6. Do you have a plan of how and when you will replace/upgrade computers?
Yes, all computers will be replaced

7. Do you have a virus scan? Yes
   Do you have a backup strategy? Yes
   How effective have these been for you? No viruses, and they have not had to use the backups yet

2.How comfortable are you in finding solutions to your technological issues?
   50 to 65% of the issues she can resolve on her own,but it depends on how pression the issue.

9. Where might you look to find answers on your own?

Source	use	frequency	Problems encountered
On line	yes	Infrequently	Email,isp connection, Word
Cd rom	no		
Books			
Other materials	Volunteers	occasionally	

Section 3: future needs

10. What additional information would have been helpful when we installed the network and equipment? How else could we have improved the process?
More detail on the networking, its difficult to say since you can never be sure what problems will come up later

11. What addition areas would you like to see materials on now (printed materials, cd-rom or addition web references) on ?
Printed material on frequently asked questions,general computer questions

12. If TecsChange offered inexpensive seminars ($35), what subjects would you interested in learning more about?
Trouble shooting errors? Yes
How to maintain a PC? maybe
Viruses? no
Networking no / troulbe shooting /use howto
Database, basic or specific training? no
Others?
What do you do if you have a 'glicky' computers
understanding what computer messages mean, which one you have to pay attention to and which ones you can ignore.

Project HIP HOP Interview
Miriama   3/21/03
An interview tool for evaluating the effectiveness of the TecsChange Local Action Committee

Section 1: Process and Equipment

3.Have the computers and network met your needs? Please explain
          Yes, they have been able to have multiple people working on 'RisingTimes', people

can use the internet to do research for articles and homework

4.How did you find the LAC process of meetings, setup and installation? Are there ways that we could have improved it?

It was informative no suggetions for improvment

3. Did we set and meet your expectations?
Yes, it took a long time for the DSL provider to set up their systems

4. The instructions that you received when the network was setup on trouble shooting network outages and setting up e-mails. Has this been useful?

Skill	use	frequency	Problems encountered
Tech plan	No		
e-mail	No		
Virus scan	Yes	Infrequently	Setting up virus scan

Section 2: tech plans

5. Do you know what a technology plan is and do you have one?
She knows what it is, has the template but hasn't started using it

6. Do you have a plan of how and when you will replace/upgrade computers?
They have applied for computers from various foundations/organizations

7. Do you have a virus scan? yes
   Do you have a backup strategy? No
   How effective have these been for you? No viurses to date,

4.How comfortable are you in finding solutions to your technological issues?
    She was able to fix the network based on what we had taught her during the install
They have not run into two many problems, mostly with the ISP so they haven't needed to do much.

9. Where might you look to find answers on your own?

Source	use	frequency	Problems encountered
On line	Yes	Occasionally	Network/email
Cd rom	No		

Source	use	frequency	Problems encountered
Books	No		
Other materials			

Section 3: future needs

10. What additional information would have been helpful when we installed the network and equipment? How else could we have improved the process?
It would have been helpful to have learned more about the server that was set up to share the dial up connection.

11. What addition areas would you like to see materials on now (printed materials, cd-rom or addition web references) on ?
On line reference sources would be helpful

11. If TecsChange offered inexpensive seminars ($35), what subjects would you interested in learning more about?no
Trouble shooting errors?no
How to maintain a PC?no
Viruses?no
Networking – more information IP and how to configure networks
Database, basic or specific training? She knows a lot about database already

ACE Interview
An interview tool for evaluating the effectiveness of the TecsChange Local Action Committee
Penn Lol 3/24/03

Section 1: Process and Equipment
    1. Have the computers and network met your needs? Please explain
        Yes, they can share files over the network as well as sending e-mail and storing shared files

    2. How did you find the LAC process of meetings, setup and installation? Are   there ways that we could have improved it?

3. Did we set and meet your expectations?
It took a longer then expected, but they are ok doing things slowly, in stages is ok since they so many other things going on

4. The instructions that you received when the network was setup on trouble shooting network outages and setting up e-mails. Has this been useful?

Skill	use	frequency	Problems encountered
Tech plan			
e-mail			
Virus scan			

He was able to fix a cable that had come lose

Section 2: tech plans

3.Do you know what a technology plan is and do you have one?

No, but they would consider using one

6. Do you have a plan of how and when you will replace/upgrade computers?

7. Do you have a virus scan? Yes
Do you have a backup strategy? Yes
How effective have these been for you?

8. How comfortable are you in finding solutions to your technological issues?
Fairly comfortable, they have made this part of someones job and but rather than try to building capacity in someone in their organization they think it they have reach a size to work with a consultant that has a wide range of skills.

9. Where might you look to find answers on your own?

Source	use	frequency	Problems encountered
On line	Yes	Ocassionally	Office software, word
Cd rom	no		
Books	no		

Source	use	frequency	Problems encountered
Other materials	no		

Section 3: future needs

10. What additional information would have been helpful when we installed the network and equipment? How else could we have improved the process?
He didn't feel

11. What addition areas would you like to see materials on now (printed materials, cd-rom or addition web references) on ?
All are ok as sources, he has used on line source before

12. If TecsChange offered inexpensive seminars ($35), what subjects would you interested in learning more about?
Trouble shooting errors?
How to maintain a PC?
Viruses?
Networking ?
Database, basic or specific training?
Others?

The only trianing that he was interested in was for Ebase, a database they use,for more of the staff.

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TecsChange
Technology for Social Change

Local Action Committee

Creating a sustainable model for the delivery of professional technical services
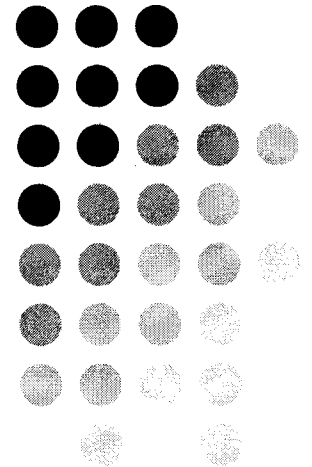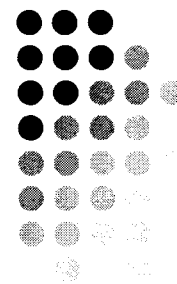
Background: TecsChange

- Started in 1994

- Volunteer directed and staffed nonprofit

- Has only one part time staff person

- Operates on a budget of less than $65,000 a year

Background: Nonprofits
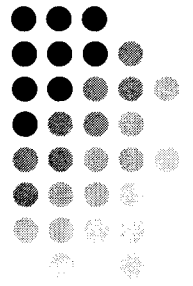
- Boston area has around 3500 nonprofits (501C3), as well as church and community groups

- Many work on small budgets with all or mostly volunteer staff

- Often forced to chose between funds for programs or technology to reach their social goals
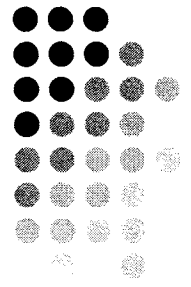
Problem

- Need for high tech service by nonprofits

- TecsChange students have requested additional training in high tech service

- How to deliver service with an all volunteer staff while balancing the need of both the nonprofits and involving students

Local Action Committee
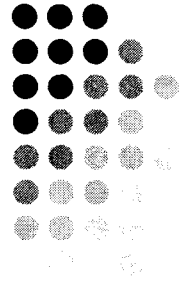
- Started In 1999 at the request of nonprofits that needed to network their computers

- Has completed 10 projects to date, 4 of which were part of this CED project

Goals
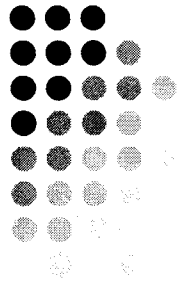
- To create a sustainable system to deliver service to nonprofits, in a way that allows them to become self-sufficient in meeting their own technical needs within the TecsChange framework.

Project HIP HOP
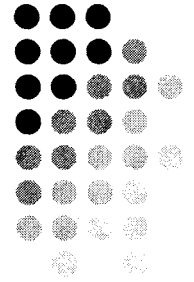
- Highways Into the Past, History Organizing Power

- Edit a bi-monthly newsletter

- A new organization with little resources

- Needed: Computers, printers and a network

Aid To Incarcerated Mothers
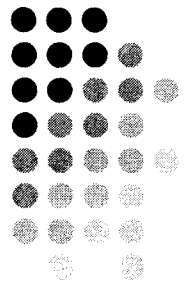
- Helps women and their families stay together, fosters self-sufficiency, while they are in prison and when they are released

- They offer legal aid, clinical services and HIV/AIDS education

- Needed: Computers and a network along with special training in Filemaker Pro, a database program

Red Tomato
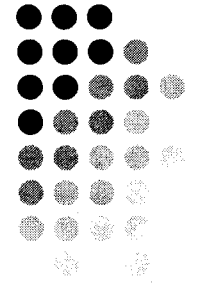
- Helps small New England farmers find markets for organic vegetables

- Creates lasting relationships between farmers and buyers

- Needed: To network computers and help with backup and anti-virus to safeguard their system

Volunteers at Red Tomato
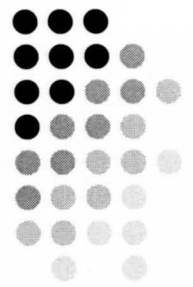
Alternatives to Community & Environment
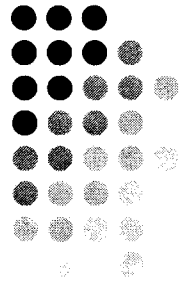
- ACE works with communities to achieve lasting environmental, public health, and economic benefits

- Works in partnership with community organizations and residents to achieve environmental justice

- Needed: To network their existing computers

Outputs
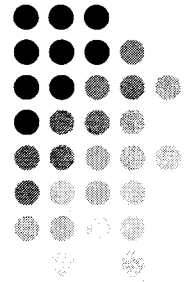
- Created a process that assesses Technology needs

- Delivered equipment and services to worthy nonprofits

- 4 working networks, 16 computers and 3 printers

- A blueprint of a technology plan that helps nonprofits deal with the needs that TecsChange cannot deliver while making better strategic decisions about their computer systems

Inputs
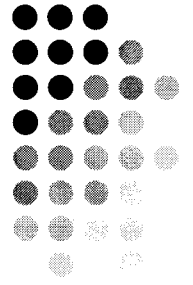
- Assessment meetings with nonprofits

- Development of draft materials for scope of work, technology plan and supporting documents

- Preparing equipment for each project

Activities
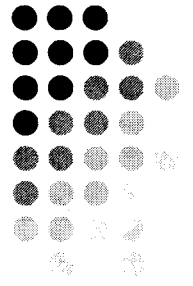
- Meetings with TecsChange community and nonprofits to assess needs and develop materials

- Trainings for both nonprofits and TecsChange community

- Work on site at nonprofits, installing, configuring and testing networks and equipment

Monitoring and Evaluation
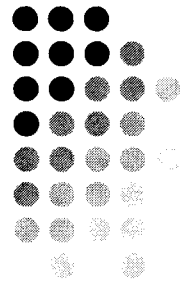
- Each of the four groups will have a PIME: Planning, Implementation, Monitoring, Evaluation cycle, all lessons learned will be applied to the next group

- Track equipment, work done

- Perceptions of the nonprofits involved in the projects
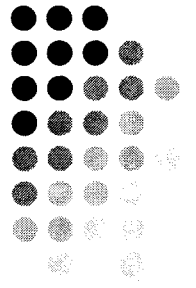
Results

- The computers and networks have met the needs of the groups involved

- People prefer online resources for troubleshooting to either books or cd-roms

- Of all that we deliver, training was the one thing that everyone asked for more of

Conclusions
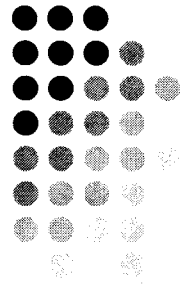
- Without clearly defined work plans, projects tend to mushroom

- The nonprofits seem to understand their dependence on technology systems and are willing to try the Tech Plans

- The key is making sure that the nonprofits understand they are responsible for the technology and the Local Action Committee is just a resource.

Changes in the Original Goal
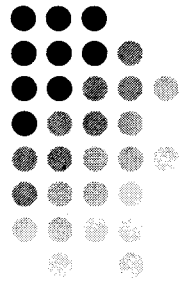
- We had hoped to include the students of the Computer Repair Committee in the implementation

- We had originally scheduled five projects, but one lost funding and no longer has a location
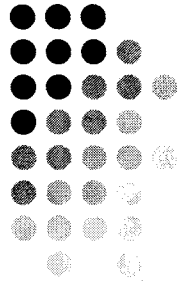
Unexpected Outcomes

- TecsChange is teaching an assessment class based in part on the tools that we put together for this project

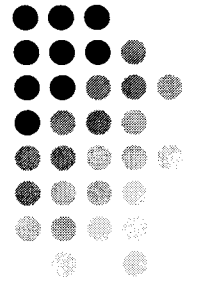# Recommendations to someone doing a similar project
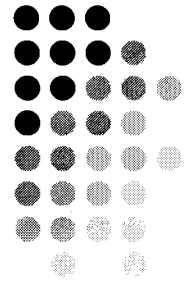
- Be realistic about timelines

- Be ready to spend most of your time training people about the technology and how to use it

- Remember that training is the most important component of any project

What makes this CED?
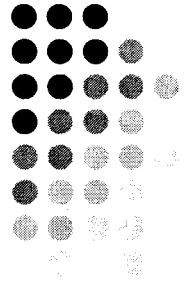
- Created at the request of the nonprofits

- The nonprofits directly shaped the projects as we all worked together to define and reach the objectives

- All work helped the nonprofits to more efficiently achieve their goals

Questions and Comments